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U.S. Department of Agriculture • Foreign Agricultural Service • Washington, D.C.

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Approved by the World Food and Agricultural Outlook and Situation Board • USDA

245 TRADE CONTINUES OFF IN THE FOURTH QUARTER OUTLOOK FOR 1980'S WORLD MEAT PRODUCTION AND TRADE.

FLM 6-80
October 1980

Total meat production is expected to increase about 3 percent in 1980 in the major meat importing countries (table 2). This record level occurs as stronger gains in mutton, lamb, and pork production pull up a minor beef and veal gain. Beef and veal output is up marginally in the United States, the European Community (EC), and Japan, down slightly in Canada. These same countries are expected to import about one-third less meat (table 3) on a net basis compared with the 1979 level.

For the 50 countries included in these estimates, beef and veal imports are expected to decline 12 percent in 1980 (table 1) from the 1979 level. Beef and veal production in the major exporting countries (table 4) is expected to decline about 7 percent, with exports down 25 percent.

Unless trade suddenly reverses its trend to date it is certain that global trade in beef and veal in 1980 will decline from the previous year's level. Increased beef and veal purchases by Japan, the USSR, and Egypt have not offset reduced purchases by the United States, the European Community, Canada, Brazil, Korea, Israel, and others. All major exporting countries have shared in the export decline, with Argentina and Australia bearing the major losses. During the first half of 1980, lower U.S. import prices attract as much beef from most exporting countries as previously expected. Higher U.S. beef import prices so far in the second half of 1980 have failed to reverse this, as many exporting countries prefer to rebuild herds.

In response to rising demand from the Middle Eastern countries--as well as spot demand from others--lamb and mutton supplies continue to be plentiful on the world market. While the conflict between Iraq and Iran may disrupt some shipments through the Persian Gulf, much of the lamb and mutton trade should remain relatively unaffected.

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Pork and poultry imports by the major importing countries have also declined in view of their increased production in 1980. Exports to some other areas, the USSR and Middle East especially, have helped total world trade in poultry.

MAJOR IMPORTERS

United States

Total red meat and poultry consumption reached record levels for the first half of 1980. Retail pork consumption increased 17 percent and poultry consumption 4 percent above year earlier levels to more than offset the 4 percent decline in beef consumption. On a retail weight basis, total red meat and poultry consumption in the first half of 1980 increased to 122.6 pounds per person, up 4 percent from that of a year earlier.

Cattle numbers were estimated at approximately 123 million on July 1, 1980, a 4 percent increase over cattle numbers of a year earlier. Poor pasture and range conditions in the Plains and Southeast States in July and August forced many areas to market cattle early. As a result, commercial beef production is expected to increase during the second half of 1980, reaching 10.8-10.9 million pounds compared with 10.5 million pounds for the first half.

Commercial hog slaughter is expected to reach about 96 million head in 1980, up approximately 8 percent from the 89.1 million head slaughtered in 1979. June-August 1980 farrowings were down 10 percent from the year-earlier level, and producer intentions are for September-November farrowings to be down a similar amount. Reduced feed supplies and higher feed costs resulting from the summer drought continue to put pressure on production costs. This is likely to result in sow farrowings remaining below the year-earlier level into 1981.

USDA's fourth quarterly estimate of 1980 meat imports subject to the Meat Import Law was retained at 1.42 billion pounds, the same as the third quarterly estimate. Meat imports subject to the law totaled 1.02 billion pounds for the first 9 months of 1980 compared with 1.17 billion pounds for the same period of 1979.

European Community

In the EC as a whole, beef and veal production is forecast to increase only marginally in 1980. Increases will occur in Ireland (5 to 6 percent), Belgium/Luxembourg (3 to 4 percent), Italy (2 percent), and the Netherlands (1 to 2 percent); reductions in production will occur in Denmark (3 percent) and the United Kingdom (1 to 2 percent). In France and West Germany, the two largest EC beef producers, only marginal increases will be registered.

EC beef and veal consumption will decrease approximately one-half percent in 1980, a reduction of about 40,000 tons from last year's level. Economic problems, coupled with high beef prices, are the major factors in this drop in EC consumption. The only Member States showing increases will be Italy and Denmark, both up around 2 percent. Consumption in every other Member State, except Ireland and France--where consumption should remain static--will fall, with the largest decline occurring in the United Kingdom (3 to 4 percent) and the Netherlands (2 to 3 percent).

EC beef intervention purchases of 152,000 tons in the first half of 1980 increased 53,000 tons over year-earlier levels. Higher slaughter occurred in France and Ireland due to the poor hay crop. Purchases for the entire year should increase slightly this year and total around 350,000 tons. Sales from intervention are expected to be greater than purchases in 1980, the reverse of the situation in 1979. During the first 6 months, sales from intervention stocks totaled 268,000 tons compared with only 145,000 tons in the corresponding 1979 period. This increase in sales occurred primarily because of an increase in exports of intervention stocks, and also because of larger domestic sales. Ending 1980 stocks are therefore forecast to decline by about 10,000 tons from the 272,000 ton level at the end of 1979.

EC exports of beef and veal to third countries are expected to increase by approximately 28 percent to 422,000 tons in 1980, continuing the trend that began in 1979. Main outlets will be the Middle East, Eastern Europe, and the USSR. EC export subsidies on beef and veal have been an important factor in this jump in trade with non-EC countries. With the increase in U.S. imported cow beef prices, the EC (primarily Ireland) has stepped up its shipments to this country under the 5,000 ton MTN (Multilateral Trade Agreement) agreement. Imports from the EC, as of October 3, totaled 864 tons, and export certificates have been granted for the balance.

EC imports of beef from third countries are now expected to decline 22 to 23 percent, to about 232,000 tons, this year. The major decrease will occur in the United Kingdom as non-EC imports are projected to fall from 100,000 tons in 1979 to only 40,000 tons this year. Of the major supplying countries, Argentina is expected to provide about 10 percent more, while Australia, New Zealand, and Uruguay should ship about 60, 10, and 45 percent less, respectively. U.S. exports to the EC, largely of high quality beef as a result of the 10,000 ton MTN concession, will probably total about 1,000 tons in 1980.

This combination of increased exports to non-EC countries and the decline in third country imports will make the EC a significant net exporter of beef in 1980.

EC pork production and consumption are forecast to increase about 2 percent in 1980 to 9.2 million tons. Production increases are expected in every Member State except the United Kingdom and Ireland. The biggest gains in consumption levels in 1980 will occur in West Germany, Italy, and France.

EC poultry meat production should be up around 4 percent in 1980, with increases in chicken and turkey of 2.8 and 6.5 percent, respectively.

Canada

Canada's cattle inventory reached 13.856 million head on July 1, 1980, up 1.3 percent from the year earlier date. Survey highlights include beef cow numbers up 5 percent, heifers for breeding down 3 percent, and slaughter type cattle down 6 percent. Beef production, which increased during the first 6 months of 1980, is expected to decline in the second half of the year as a result of last year's small calf crop.

Pig numbers were estimated at 9.1 million head on April 1 (up 11 percent from the year earlier level). While second quarter farrowing intentions remained the same as those of a year ago, farrowing intentions for the third quarter indicated a 12 percent decrease. If intentions become fact, this would mark the first quarterly drop in more than 3 years.

Canada's increased pork production, which carried over from the higher hog numbers of 1979, caused hog and pork prices to weaken in the first half of 1980. The substitution of pork for beef in Canadian diets also caused beef prices to weaken, aiding exports of both pork and beef, but discouraging imports. Canadian imports of beef and veal are expected to drop almost 40 percent during 1980 from the 1979 level.

Beef trimmings from higher grade carcasses accounted for nearly 30 percent of total fresh and frozen beef exports to the United States in the first 6 months of 1980, an altering in the pattern of this trade. Prior to 1979, exports of beef trimmings did not contribute significantly to what has traditionally been a boneless cow-beef trade.

Canadian pork exports continued to soar in the first half of 1980, up about 50 percent from the year earlier level. Pork exports in the second half of 1980 are expected to slow as Canadian beef supplies are reduced and the pork expansion slows.

Japan

The year-to-year increase in Japanese red meat consumption during 1980 is estimated at slightly over 1 percent, compared with an almost 8 percent rise in 1979. Beef and pork are showing gains, while mutton and horsemeat consumption are falling. Domestic beef production in 1980 is expected to grow less than 1 percent above the 1979 level to 405,000 tons while beef imports should rise to 190,000 tons carcass weight equivalent (CWE), a 3 percent gain. The exact magnitude of the increases will depend on economic conditions, competition from abundant pork supplies, and the extent to which meat stocks are drawn down. Part of the anticipated increase should be in high-quality

beef, of which the United States is virtually the only supplier. The share of beef supplied by Australia and the United States was 77 and 18 percent, respectively, in 1979 and should remain near these levels in 1980.

Japanese pork production in 1979 was almost 190,000 tons, up 25 percent from the year earlier level. Pork production in 1980 is being affected by the high production and imports in late 1979 that forced stocks up and prices down. The 1980 production increase may be about 5 percent. To combat the situation of high stocks and low prices, the Government provided monetary incentives for holding stocks, and persuaded farm organizations to call for a reduction in breeding herds. Also, domestic pork producers convinced meat processors and importers to store imported pork and delay making new import contracts until about May. Pork consumption is growing less than half as fast as in 1979 so neither prices nor imports are recovering as rapidly as earlier forecast. However, imports should strengthen to some extent in the second half of 1980 as production gains should be less than the consumption growth by that time.

The large supplies of pork are exerting exceptional pressure on mutton imports as these two meats compete in the "processed ham" industry. With abundant and low priced pork, the downward trend on mutton imports of recent years will be dropping about 20 percent in 1980 as compared with 1979. Poultry consumption has also been affected by the heavier pork supplies; however, 1980 poultry meat production and imports are still expected to increase about 4 and 20 percent, respectively.

USSR

Overall meat production (on a liveweight basis) from Soviet collective and state farms for January-August 1980 was 9.65 million tons, 4 percent below that of the same period in 1979. The liveweight meat production figures for the first 8 months show declines of 5 percent in beef and 7 percent in pork, but a 7-percent increase for poultry.

During the first 2 months of 1980, Soviet meat production was 13 percent ahead of the 1979 level. The Soviets then apparently decided to increase livestock and poultry inventories despite their tight feed situation, at the cost of lighter animal slaughter weights and lower meat production. The average liveweight at slaughter for cattle and hogs for the January-August 1980 period was down 2 and 3 percent, respectively, from that of the previous year. The result was that monthly meat production from collective and state farms during March-August 1980 was below the corresponding output for 1978 and 1979.

It is presently estimated that total meat production (slaughter weight, including fats and offals) for 1980 will be 15.2 million tons, 2 percent below 1978 and 1979 levels.

Inventories of cattle and poultry on collective and state farms were slightly higher on September 1, 1980, than on September 1, 1979. However, hogs and total sheep and goat numbers were down by about 2 percent.

Soviet meat imports during 1980 may be about 15 percent above those of 1979 as record imports of both pork and poultry are forecast. Eastern Europe, the EC, Argentina, and Australia are expected to be the leading suppliers, in that order.

Eastern Europe

Meat production in the seven East European countries--which was 10.9 million tons (carcass weight) in 1979--is expected to increase slightly in 1980. While the production situation varies among the countries, red meat production should not deviate greatly from last year, but an increase in poultry is foreseen. Most East European countries will continue to be sizable net exporters of meat.

Brazil

Herd rebuilding is expected to continue throughout 1980, as the total cattle inventory is forecast to rise 3 million head to 96 million. While total slaughter, at 10.6 million head, is expected to be slightly below the 1979 level, total beef production should approach 2.15 million tons, 2 percent above 1979's level, as heavier cattle are marketed.

Beef exports, while still forecast above the 1979 levels, have been reduced to around 120,000 tons in light of lower than anticipated export levels in the first half of the year. Imports of 35,000 tons, only one-third of last year's level, still appear likely owing to relatively high prices and restrictive policies in Argentina and Uruguay, Brazil's two major suppliers.

With beef availability relatively unchanged, pork and poultry is meeting Brazil's increasing demand for meat. Pork production and domestic consumption are each expected to increase around 15 percent in 1980. There are currently no exports of pork because of a ban on exports imposed after an African Swine Fever outbreak in 1978. Poultry production in 1980 is also expected to grow 15 percent above the 1979 level to 1.28 million tons, continuing the trend of recent years. Most of this increased production will be consumed domestically, but some will be exported, pushing both to record levels. Brazil's major export markets for poultry are in the Middle East, where markets have been developed with the aid of export assistance.

MAJOR EXPORTERS

Australia

Cattle inventories, already at a 3 year low, are projected to decline further in 1980 as cattle producers seem to be hesitant about the immediate future. The slaughter of females has been accentuated at times since the beginning of the year by dry conditions in New South Wales and parts of Queensland, further delaying the turnaround of the cycle. Beef production for 1980 is expected to decline about 15 percent.

Australia's forecast of 1980 beef exports is 550,000 tons product weight, about 20 percent below the 1979 level. While lower exports are envisioned to all countries, the United States, Japan, Canada and the Middle East are expected to account for 90 percent of Australia's exports in 1980, compared with 80 percent in 1979. Exports of beef to the USSR are forecast to be small.

Lamb and mutton production is expected to increase in 1980, owing both to expanding export markets and the drought, which has made feed and pastures scarcer causing more animals to be sent to slaughter. Domestic consumption of lamb and mutton is forecast to decline slightly in 1980, while exports rise. Sales prospects appear particularly favorable in the Middle East, but are vulnerable to political developments.

New Zealand

Excellent pasture conditions have encouraged retention of livestock on farms to take advantage of higher weight gains. This has caused some increase in cattle numbers, although there is no clear-cut evidence of a prolonged buildup of cattle numbers. Beef production in 1980 is forecast to increase about 5 percent, as heavier animals are making up for slightly fewer slaughterings.

Sheep numbers are expected to show a 3-4 percent increase in 1980 over the previous year. Lamb and mutton production is increasing somewhat more as a result of heavier average slaughter weights.

Total beef exports in 1980 are forecast to decline about 10 percent, with exports to the United States expected to be down about 5-6 percent. Total lamb exports should rise 10 to 15 percent in 1980, as markets are expanded and/or developed in the Middle East.

Central America

Central American meat exports to the United States for those meats covered by the U.S. meat import law are currently estimated at 215 million pounds for 1980, compared with 228 million pounds for 1979.

Pesticide residue problems in El Salvador and Guatemala account for some of the reduction. El Salvador's meat export packing plants have been prohibited from exporting since March, while Guatemala has not shipped any beef to the United States since August 1. Costa Rica experienced temporary plant shutdowns for several months as a result of a shortage of steers for slaughter. The plants affected reopened and resumed operations in mid-July. Nicaragua has experienced a slowdown in beef exports as a result of problems in several areas, including land, management, and capitalization.

Mexico

Limited feedgrain supplies as a result of a severe drought have caused many swine, dairy, and poultry producers to reduce their inventories of these animals. The beef industry, while not as adversely affected by feedgrain shortages, has been affected by the severe drought throughout all of the major beef producing states. Beef cattle losses have been estimated at nearly 100,000 head during the past year. Some early marketing of animals occurred to reduce the risk of further death losses.

The export level for feeder cattle (200 kg. or less) during the September 80-August 1981 quota year has been established at a level of 500,000 head. Cattle producers continue to insist that a larger quota is essential because of poor pasture conditions, but Government officials feel that assurances of an adequate domestic beef supply must moderate the number of feeder cattle exported.

Biological residue testing laboratories are now operational in Mexico, furthering the possibility that beef exports could resume in the near future. However, to date beef exports have not restarted.

Argentina

Despite the earlier threat of increased cattle offerings owing to floods in Buenos Aires Province, the cattle slaughter forecast for 1980 is unchanged at 14.0 million head. The floods caused many of the cattle to be moved from the flooded area to west-northwest Buenos Aires, where pastures are in good condition. There has been a very slight drop in average slaughter weight per animal; thus, total beef production in 1980 is now forecast at 2.86 million tons, down 8 percent from the year earlier level.

The Argentine beef export forecast for 1980 has again been reduced by 25,000 tons to 450,000 tons CWE, down 35 percent from last year. This drop is a result of continued weak foreign demand, an unfavorable exchange rate policy, and the tight financial situation of the export slaughter and packing plants. The USSR has sharply increased its imports of fresh frozen beef and this year is receiving 40 percent of

the Argentine exports of this product. With stable beef prices and weaker export demand, domestic beef consumption for 1980 has been revised upward by 25,000 tons to 2.43 million tons.

Per capita consumption during the first 6 months of 1980 is estimated at 91 kilograms compared with 86 for the last half of 1979, assuring Argentina's rank as the No. 1 beef consuming nation in the world.

Uruguay

With Uruguayan beef prices considerably above 1979's, demand in both the domestic and international markets has slackened, and the slaughter and production estimates have been lowered. Slaughter and beef and veal production for 1980 are now expected to be 1.2 million head and 245,000 tons CWE, respectively.

The smaller slaughter will likely lead to an increase in the year-end cattle inventory, perhaps to about 11.1 million head. This, together with the anticipated ending inventory for sheep, will put the combined animals numbers total at around 24 million head--the highest level in at least a century--and one which is expected to strain Uruguayan pasture and forage capacity to their limits.

Beef exports are now forecast to be about 70,000 tons CWE, down 14 percent from 1979's. While exports to the Middle East and certain other countries are rising, those to Brazil, Uruguay's leading market, and other markets are smaller.

TABLE 1--BEEF AND VEAL: IMPORTS BY SELECTED COUNTRIES,
1977-80 (CARCASS WEIGHT EQUIVALENT)

Country			Estimated		Forecast	Changes 1980/79
	1977	1978	1979	1980 1/		
	----- (In thousands of metric tons) -----					
						(Percent)
United States	890	1,053	1,103	967	-12	
EC 2/	292	270	299	232	-22	
Yugoslavia	28	51	27	21	-22	
Canada	89	102	87	55	-43	
Japan	121	143	185	190	3	
Spain	50	73	80	80	0	
Greece	92	120	115	110	-4	
USSR	342	56	145	255	76	
Brazil	35	118	105	35	-67	
Korea, Republic of	8	45	60	1	-98	
Israel	30	37	71	29	-59	
Egypt	40	134	74	90	22	
Other countries 3/	451	314	204	195	-4	
Total Base	2,468	2,516	2,555	2,260	-12	

1/ FAS forecasts. 2/ Excludes intra-trade. 3/ Combination of approximately 30 countries additional to the preceding list.

Source: Reports of U.S. Agricultural Attaches and related information.

TABLE 2--MEAT PRODUCTION IN MAJOR IMPORTING AREAS, 1977-80
(CARCASS WEIGHT EQUIVALENT)

Commodity and Country	1977	1978	Estimated 1979	Forecast 1980 1/	Changes 1980/79
(In thousands of metric tons)--:(Percent)					
Beef and Veal:					
United States	11,845	11,283	9,925	9,951	0
Canada	1,143	1,060	946	935	-1
EC	6,368	6,406	6,811	6,842	0
Japan	361	403	402	405	1
Total	19,717	19,152	18,084	18,133	0
Pork:					
United States	6,009	6,075	7,008	7,520	7
Canada	539	620	750	850	13
EC	8,179	8,609	9,047	9,206	2
Japan	1,169	1,284	1,430	1,495	5
Total	15,896	16,588	18,235	19,071	5
Mutton and Lamb:					
United States	159	140	133	137	3
Canada	5	4	4	5	25
EC <u>2/</u>	510	525	535	570	7
Japan <u>3/</u>	<u>3/</u>	<u>3/</u>	<u>3/</u>	<u>3/</u>	<u>3/</u>
Total	674	669	672	712	6
Poultry: <u>4/</u>					
United States	5,535	5,879	6,507	6,604	1
Canada	461	484	535	515	-4
EC	3,464	3,591	3,735	3,872	4
Japan	923	1,027	1,109	1,157	4
Total	10,383	10,981	11,886	12,148	2
Total meat:					
United States	23,548	23,377	23,573	24,212	3
Canada	2,148	2,168	2,235	2,305	3
EC	18,521	19,131	20,128	20,490	2
Japan	2,453	2,714	2,941	3,057	4
Total	46,670	47,390	48,877	50,064	2

1/ FAS forecast. 2/ May include some goat meat. 3/ Less than 500 tons.
4/ Product weight basis.

SOURCE: Reports of U.S. Agricultural Attaches and related information.

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TABLE 3--NET MEAT IMPORTS IN MAJOR IMPORTING AREAS, 1977-80
(CARCASS WEIGHT EQUIVALENT)

Commodity and Country	1977	1978	Estimated: 1979	1980 <u>1/</u>
----- (In thousands of metric tons)-----				
Beef and veal:				
United States.....	844	981	1,025	889
Canada.....	38	57	35	- 15
EC <u>2/</u>	148	94	- 30	-190
Japan.....	120	143	185	193
Total	1,150	1,275	1,215	887
Pork:				
United States.....	66	97	97	121
Canada.....	46	- 2	- 46	- 85
EC <u>2/</u>	-45	35	- 50	- 69
Japan.....	152	148	188	140
Total	219	278	189	-107
Mutton' and lamb:				
United States.....	8	17	19	21
Canada.....	14	17	21	15
EC <u>2/</u>	215	229	213	206
Japan.....	296	279	237	180
Total	533	542	490	422
Poultry: <u>3/</u>				
United States.....	-189	-194	-221	-239
Canada.....	25	28	26	24
EC <u>2/</u>	-155	-126	-194	-222
Japan.....	45	62	72	87
Total.....	-274	-230	-317	-350
Total meat:				
United States.....	729	901	920	792
Canada.....	123	100	36	- 61
EC <u>2/</u>	163	232	- 61	-275
Japan.....	613	632	682	600
Total	1,628	1,865	1,577	1,056

1/ FAS forecasts. 2/ Excludes intra-trade. 3/ Product weight basis.

SOURCE: Reports of U.S. Agricultural Attaches and related information.

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Commodity Programs, FAS, USDA

TABLE 4--PRODUCTION AND EXPORTS OF BEEF AND VEAL BY MAJOR EXPORTING COUNTRIES, 1977-80 (CARCASS WEIGHT EQUIVALENT)

Item					Estimated	Forecast	Changes 1/: 1980/79
	1977		1978		1979	1980	
	(In thousands of metric tons)						(Percent)
Production:							
P.L. 88-482 countries: ^{2/}							
Australia.....	2,149	2,134	1,768	1,502		-15	
New Zealand ^{3/}	558	562	512	500		-2	
Central America ^{4/}	386	426	439	430		-2	
Mexico.....	974	1,054	1,025	1,055		3	
Subtotal.....	4,067	4,176	3,744	3,487		-7	
Other:							
Argentina.....	2,914	3,193	3,092	2,856		-8	
Uruguay.....	363	354	266	245		-8	
Subtotal.....	3,277	3,547	3,358	3,101		-8	
Total.....	7,344	7,723	7,102	6,588		-7	
Exports:							
P.L. 88-482 countries: ^{2/}							
Australia.....	1,061	1,131	1,089	825		-24	
New Zealand ^{3/}	384	346	343	310		-10	
Central America ^{4/}	127	150	175	142		-19	
Mexico.....	45	45	6	5		-17	
Subtotal.....	1,617	1,672	1,613	1,282		-21	
Other:							
Argentina.....	583	740	697	450		-35	
Uruguay.....	129	112	81	70		-14	
Subtotal.....	712	852	778	520		-33	
Total.....	2,329	2,524	2,391	1,802		-25	

^{1/} FAS forecasts. ^{2/} Excludes Canada and Ireland. ^{3/} Year ending September.

^{4/} Includes Haiti and Dominican Republic, excludes Belize.

SOURCE: Reports of U.S. Agricultural Attaches and related information.

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TABLE 5--PRODUCTION AND EXPORTS OF MUTTON AND LAMB BY MAJOR EXPORTING COUNTRIES, 1977-80 (CARCASS WEIGHT EQUIVALENT)

Country	1977	1978	Estimate 1979	Forecast 1980 1/	Changes 1980/79
----- (In thousands of metric tons) -----:(Percent)					
Production:					
Australia.....	538	492	532	542	2
New Zealand 2/ 3/...	499	502	514	558	9
Argentina.....	132	130	129	110	-15
Total.....	<u>1,169</u>	<u>1,124</u>	<u>1,175</u>	<u>1,210</u>	<u>3</u>
Exports:					
Australia.....	272	245	213	238	12
New Zealand 2/.....	406	378	436	455	4
Argentina.....	42	38	31	15	-52
Total.....	<u>720</u>	<u>661</u>	<u>680</u>	<u>708</u>	<u>4</u>

1/ FAS forecasts. 2/ Year ending September. 3/ May include some goat meat.

SOURCE: Reports of U.S. Agricultural Attaches and related information.

October 1980

Commodity Programs, FAS, USDA

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